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ABSTRACT

This paper presents findings of an interim evaluation of a site-based management (SBM) project involving three elementary schools in Toledo City Schools (Ohio). A survey of all teachers in the three schools elicited 52 responses, a 98 percent response rate. Teachers reported that relative progress had been made in the areas of collaboration, involvement with the business community, release time, cooperative planning, inservice, and business input. They identified the following areas in need of improvement: principals' knowledge about rationales for classroom decisions, regular access to staff who had experienced similar problems, the process for establishing home-school relations, parental involvement with children with learning or behavioral problems, and coordination between programs for special children and other children. Data for the year preceding implementation (1991-92) and for the first year of site-based management (1992-93) were also reviewed. Major issues considered by the Site-Based Management Review Committee involved the school calendar, funding, collective bargaining, and site authority. Twelve recommendations are included. Appendices contain survey data, the SBM plan, a sample educational trust agreement, the board of education resolution on site-based decision making, and a sample request for proposal. (LMI)

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Interim Evaluation Report of the Site-Based Management Program at Ottawa River, Raymer, and Westfield Elementary Schools

Jess E. House, Ph.D.

Presented to the

Community Coalition for Effective Education

April 12, 1994

Toledo, Ohio

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Interim Evaluation Report of the Site-Based Management Program at
Ottawa River, Raymer, and Westfield Elementary Schools

Abstract

This paper is an interim report on an evaluation conducted of a site-based management project involving three elementary schools in Toledo City Schools. The evaluation was commissioned by the Community Coalition for Effective Education (CCEE), a group representing the Toledo business community. The school district and the district's bargaining units forged a three-year trust agreement which provided the framework for the project. The agreement set forth three structural elements: the Site-Based Management Review Committee (SBMRC), Collaborative Leadership Teams (CLTs), and Instruction Coordinators. Proposals from the three buildings were approved in May, 1992, effective at the beginning of the 1992-93 school year.

Buildings were given site authority for expending discretionary funds and were allowed to carry over unexpended funds into the next fiscal year. They also received supplemental funds from the district, money and equipment donations from business sources, and technical assistance from the district and the business community..

Implementation activities were identified in the areas of instruction, parent relations, business involvement, students, and in other areas. Teachers participated in inservice programs on team-building, whole language, cooperative learning, student self-esteem, integrated language arts, math manipulatives, and stress management.
A survey of teacher perceptions of processes related to attainment of the goals identified in their proposals was administered to the teachers in March, 1993, and the results were reported. Teachers perceived relative progress had been made in the areas of collaboration, involvement with the business community, release time, cooperative planning, inservice, and business input. Lagging areas were principal knowledge about rationales for classroom decisions, regular access to staff who have faced similar problems, process for establishing home and school relations, sharing problems, greater parental involvement with children with learning or behavioral problems, and greater coordination between programs for special children and other children.

Baseline data were identified for the year preceding the implementation of site-based management (1991-92) and for the first year of site-based management (1992-93) in the areas of student attendance, teacher attendance, student achievement, and suspensions and expulsions.

The major issues considered by the Site-Based Management Review Committee were in the areas of the school calendar, funding, collective bargaining issues, site authority, and other areas.

Recommendations were made as foilows:

1. Recommend that buldings reexamine goals that relate to each of the lagging areas and consider revising their plans for attaining them.

2. Recommend that the SBMRC determine how it can become more proactive in supporting the site-based managed schools.

3. Recommend that the buildings determine the extent of alignment of their taught curriculum with the Metropolitan Achievement Test.

4. Recommend that the district and union leadership collaborate in identifying low-cost or no-cost alternatives that would provide teachers with opportunities for collaboration with one another and with parents.

5. Recommend that parties to the collective bargaining agreement work toward eliminating bumping of non-certified union members from site-based managed schools.

6. Given that adversarial relationships that may have developed in past years are interfering with mutuality, recommend that union leadership be invited to join in a continuing dialogue about site-based management's effect on their mutual interests.

7. Recommend that the CCEE and CLTs exchange their views on how business consultants could be better utilized in the future.

8. Recommend that non-site-based managed buildings be given site control over discretionary funding.

9. Recommend that each CLT use a systematic means of identifying the issues that staff members wish to participate in deciding. Recommend that each teacher and staff member receive information about situations that they might be expected to have an interest in and be encouraged to participate in decisions that affect them. Recommend that CLTs examine the channels they use for communication and decision-making.

10. Recommend that the Site-Based Management Academy be established and that the academy's mission include preparing all staff members of prospective site-based managed schools.

11. Recommend that efforts to acquire new knowledge and skills through inservice and consultants be maintained, and perhaps increased.

12. Recommend that the trust agreement be extended to five years.

Three blind men were traveling along a road in ancient Persia and came upon an elephant. None of the men had ever encountered such a creature before and stopped under a tree afterward to discuss their experience. The first fellow had brushed against the elephant's trunk and so described his experience with the creature as being very like handling a large snake. The next man had bumped into the side of the beast and thus declared that an elephant was certainly much like a wall. The third man had circled his arms around one of the elephant's legs and insisted that the elephant most closely resembled a tree.

-- Sufi parable

Background

Introduction

Site-based management is, like the elephant in the tale above, a large, varied, and somewhat unfamiliar phenomenon that may lead individuals who experience different aspects of it to develop markedly different convictions concerning its nature and worth. This evaluation of the site-based management project at Ottawa River, Raymer, and Westfield elementary schools in Toledo City Schools attempts to avoid the mistake of the blind men by examining multiple aspects of the project. This is an interim report on site-based management in Toledo Public Schools at the midway point of the three-year span of the trust agreement (described later). This report describes the planning phase of the project, recounts the major activities that comprise the implementation phase, reports on several baseline indicators that were identified for monitoring, provides the results of a survey administered to teachers at the site-based managed schools in March of 1993, and makes several recommendations for the site-based management project.

Evaluation

This evaluation was commissioned by the Community Coalition for Effective Education (CCEE) to provide information to the sponsors and to TPS personnel who have an interest in the site-based management effort at the three sites that may be used to guide implementation decisions. The purpose of the evaluation is to serve as an aid in the on-going development of site-based management in Toledo by determining feasibility and identifying preferred characteristics of site-based management. The clients for the evaluation and other stakeholders agreed that the objective of the site-based managed project was to increase student performance; however, they recognized that measures of student achievement would probably not respond

immediately to site-based management, a change in organizational governance.

CCEE

Several community organizations, namely, the Corporation for Effective Government, The Toledo Chamber of Congress, and the Committee of 100 formed a coalition to focus on activities relating to public education in the City of Toledo. This group was named the Community Coalition for Effective Education. The CCEE established four working groups in late summer of 1992, one of which was the Organizational Structure Task Force. The charge given to this group by the Steering Committee of the CCEE was as follows:

> To develop an organizational structure, which will maximize the time spent in and optimize the effectiveness of the teacher/student relationship. Focus will be placed on empowerment and responsibility being maximally on the individual school and the teachers therein.

An accompanying timetable called for the Task Force to be formed by September 15, 1991, resource review completed by January 1, 1992, and a proposed organizational structure to be recommended by April 1, 1992.

The task force was chaired by Mr. John Davies, a principal in a benefits consulting firm and was comprised of 13 individuals from, as Davies put it, "various disciplines:" a Toledo school teacher, a college professor, a Toledo school district cabinet-level administrator, a state senator, an attorney, a bank vice-president, a corporate executive, a corporate manager, a small business owner, a Roman Catholic priest, an Episcopalian minister, and a Jewish rabbi. Twelve of the task force members were Caucasian; one was African-American, and ten of the members were male; three were female.

The first meeting of the task force was preceded by a meeting of the CCEE Steering Group with members of the Toledo Board of Education. Beginning on September 13, 1991, the task force met on a nearly weekly schedule with school district officials and union officials representing administrative, teaching, and support personnel to exchange views on site-based management. In a letter to Dal Lawrence, Toledo Federation of Teachers (TFT); Dave McClelland, Toledo Association of Administrative Personnel (TAAP), and George Tucker, American Federation of State, County, and Municipal Employees (AFSCME) group, inviting them to a meeting of the task force to be held on October 22, 1991, the task force defined site-

based management as a school managed at the site having three features:

a. Principals will select school staff from among volunteers. An employee at the site who is not selected will be transferred to another site without pay reduction.
b. A budget will be developed at the site and will include all expenses, including purchased services of the Central Administration. Budgeted amounts will not exceed the total budget that each site was to be allocated in the existing Toledo School budget.
c. Curriculum and text books will be selected at the site.

At the meeting of October 22, 1991, union leaders pointed out that proposals for site-based managed schools were being discussed in labor negotiations currently underway.

The task force met with Superintendent Crystal Ellis on November 14, 1991. The superintendent stated that his administration and the three unions were all supportive of the site-based management concept and distributed a Toledo Public Schools document titled, "Site-based Management Plan" (Appendix B). This paper noted potential benefits (i.e., increases in staff ownership, decision speed, faculty interest in staff development, and building accountability) and warned of possible pitfalls (i.e., competition among buildings for resources, decrease in district-level accountability, narrow focus on standardized test results, and buildings caught in neighborhood battles). The paper made recommendations in the areas of goals, decision making, staffing, budgeting, instruction, evaluation, alternatives for site-based sites, school calendar and school day, and the study of school choice, and it called for three to five site-based managed schools as a pilot in the fall of 1992 with the possibility of additional schools added the following year.

On November 18, 1991, John Davies joined Crystal Ellis, Dal Lawrence, Dave McClelland, George Tucker, and Frank Pizza, Chief Negotiator for the district, and others who were meeting to work on a proposal for site-based management. The group, joined by the five AFSCME locals, met again on November 22, 1991, and agreed on a draft of a trust agreement (Educational Trust Agreement: Site-Based Management/Shared Decision Making, Appendix C) that was eventually approved by the union membership. This agreement established two new groups that were to provide direction and support for the site-based management project: the Collaborative Leadership Team and the Site-based Management Review Committee. The agreement also established the roles of Instructional Coordinator, Primary Coordinator, and Intermediate Coordinator. The role of these positions, of the Site-Based Management Review Committee,

and of the principal in site-based management were all described. Other matters addressed in the agreement include funding, course of study and textbook adoptions, incentives, staffing, internal evaluation, parents, school calendar and school day, task forces for providing assistance, establishment of a Site-Based Management Academy, additional meeting time, discipline and attendance, and a timetable for expansion of site-based management. The agreement is to expire on June 1, 1995, unless the signatories agree to continue it.

The Board of Education unanimously approved a resolution that authorized the superintendent to develop plans to develop a site-based management program on November 26, 1991 (Appendix D).

Planning

Request for Proposals

The Request for Proposals (RFP) was a document titled "Request for Proposal: Procedure for Selection for Site-Based Management/Shared Decision Making" (Appendix E). The rationale provided for site-based management in the RFP concerned a need to improve academic achievement. Site-based decision-making through empowerment of staff and parents was linked to improved student achievement. Site-based management was defined as:

> ...each school takes the responsibility for providing effective education for its students. The staff at each school creates a plan and uses the finances and other resources available to achieve that goal.

Proposals were to include a statement of strengths, needs, and objectives, a plan of action, plans for the involvement of parents, businesspersons, and other community members, plan for evaluation, and specific incentives or needs in their proposal.

The RFP was sent to all elementary principals, TFT building representatives, and AFSCME representatives and complete applications had to be signed by the principal, TFT representative, and the AFSCME representative.

Proposals

Proposals were submitted by four elementary school buildings by the end of May, 1992. The Ottawa River, Raymer, and Westfield buildings were selected for the project.
Proposals were invited again during the first year of the project. An elementary school with a high number of paraprofessionals voted to apply for site-based status. A disagreement arose

over representation on the school's Collaborative Leadership Team. The TFT wanted to add a fourth person to the team to represent the paraprofessionals in the building. As described in the next section (Implementation), the Trust Agreement stipulates that the team is composed on three persons, only one of which is a TFT member. Because paraprofessionals are TFT members, the TFT proposal would result in two TFT members on the team. The other unions did not agree with the TFT on the issue, and the school's proposal was not formally submitted.

Implementation

Structure

The primary structural elements for the site-based management project were the collaborative leadership teams, instruction coordinators, and the site-based management review committee.

Collaborative Leadership Team (CLT)

The agreement specifies that school goals, budgets, instructional organizations, and other operational procedures are to be established at site-based managed schools through collaborative decision making, and that a Collaborative Leadership Team be comprised of three persons: the principal, instruction coordinator, and a non-teaching representative. The team may add others (Expanded CLT).

Instruction Coordinator

The Instruction Coordinator was assigned responsibility for issues related to achieving the building's instructional goals and objectives, such as supplemental textbook/instructional materials, methods of instruction, grouping of students, reporting systems. The coordinator is to be assisted by a primary and an intermediate representative.

Site-Based Management Review Committee

The Site-Based Management Review Committee (also established by the Educational Trust Agreement) is made up of the superintendent, a TFT representative, a TAAP representative, an AFSCME representative, and a representative from the Community Coalition for Effective Education as an ex officio member. The committee makes recommendations on site-based issues through the superintendent to the school board.

Resources

The site-based managed schools have three sources of funds available to them from the

school district: discretionary funding, supplementary funding, and carryover. They also used district resources from the Office of School Improvement Assistance and the Testing Office. Resources from outside the district include funding from the CCEE, donations of furniture, equipment, and consultants provided by the business community.

Discretionary Funds

As required by the Educational Trust Agreement, a portion of the funds allocated to site-based managed schools were designated as discretionary. All school sites in the district have discretionary funds allocated to them. Site-based managed schools differ from the other school sites in that non-site-based managed schools may only transfer money between accounts with the approval of the Executive Director of Elementary or Secondary Education. Site-based managed schools have the authority to make transfers between accounts without such approval. Table 1 provides a breakdown of the discretionary for the three schools for Fiscal Years 1993 and 1994.

Table 1. Discretionary Funding for Site-Based Managed Schools

	Ottawa River		Raymer		Westfield	
	FY93	FY94	FY93	FY94	FY93	FY94
Sub Teachers	8,885	9,029	24,126	25,860	11,630	12,858
Sub Administrators	732	732	1,463	1,463	732	732
Tutorial	4,711	4,792	7,477	7,370	5,757	5,837
General	3,132	3,379	10,284	10,122	5,835	6,113
Textbook Replacements	3,795	2,521	12,220	7723	7,080	4,777
Custodial	3,716	3,716	4,227	2,540	2,540	
Supplemental	1,341		3,922		2,632	
Library	2,647	2,730	3,782	3,788	3,076	3,159
Travel	500	500	500	500	500	500
Curriculum	1,046	805	3,066	2,389	1,798	1,461
Consumables		3,374	11,140		5,808	
Supp Contracts	3,800	2,000	6,800	2,800	3,400	2,400
Total	34,305	33,578	77,867	77,384	44,980	46,184

Additional Funding

Site-based schools were allocated additional, or supplemental, funding by the school district (Table 2). This funding is beyond the discretionary allocation. Additional funding for the first year (1992-93) was based on the site-based management proposals submitted by the three schools. The site-based schools submitted requests for additional funding for the second year (1993-94). Initially, the Site-Based Management Review Committee attempted to consider each of the items submitted in the schools' budget request. However, the superintendent stated that he did not want to choose among the items proposed by the schools; instead, the buildings were each provided with a 10% increase over the 1992-93 additional funding allocation.

Table 2. Additional Funding for Site-Based Managed Schools

	Ottawa River	Raymer	Westfield
Art Teacher	6,000	18,000	11,600
Music Teacher			5,300
Music Instr.			1,782
Speech Teacher	3,175		
Lunchroom Worker	2,394		
Staff Inservice	8,958	6,058	2,752
Add'tl Sub	1,050		
Parent Handbook	350		
P/T Conference (Subs)	1,613		
Math/Sci Manipulatives	1,961		
Tutorial Program		2,000	
Instructional Equipment		8,000	
Building Substitute		26,000	
Programs/Field Trips		500	2,500
Behavior Incentives		1,800	
School Community Partner Program			16,000
Parent Involvement Workshops			5,000
Total	$33,578	$77,384	$44,934

Site-Based Expenditures for Fiscal Year 1993

Adding together discretionary funding and additional funding, Ottawa River, Raymer, and Westfield were appropriated $45,595, $108,030, and $73,452, respectively, for expenditures to be made at the building site during the 1992-93 school year. Table 3 shows the expenditures by object. Of that amount, Ottawa River, Raymer, and Westfield expended $17,432 (51.5%), $46,943 (70.8%), and $39,092 (66.2%), respectively, for personnel.

Table 3. Expenditures of Site-Based Managed Schools, FY93

	Ottawa River	Raymer	Westfield
Certificated Staff	4,930	0	5,918
Certificated Staff-Music	0	0	5,799
Certificated Building Substitute	0	18,431	0
Certificated Substitute	8,889	19,956	21,831
Administration Substitute	171	0	0
Non-Certificated Staff, Teacher Aides	3,613	8,362	4,294
Non-Certificated Staff, Recess	0	0	8,912
Travel, In-District	138	0	0
Travel, Out-of-District	640	441	445
Art, Toledo Museum of Art	0	0	1,250
Instructional Supplies	5,344	10,366	4,619
Teaching Aids	287	1,140	0
Replacement Textbooks	2,375	94	0
Supplemental Textbooks	0	173	0
Equipment	2,903	207	0
Equipment Repair Supplies	0	292	0
Testing Services	527	0	0
Classroom Support	0	1,660	0
Health & Safety Supplies	249	0	0
Library Books	796	581	1,619
Periodicals	0	0	260
Cassettes (video, audio)	0	0	326
Telephone	0	0	165
Postage and Stamps	140	475	220
Printing	160	465	166
Supplies	644	1,199	728
Building Supplies	190	0	261
Academic-Oriented Activity	1,808	2,261	2,219
Year-to-Date Expenditures	33,804	66,299	59,033
Outstanding Encumbrances	3,317	34,055	2,095
Unexpended Balance	9,476	7,676	14,419
Appropriation	$45,595	$108,030	$73,452

CCEE Funding

Ottawa River received money from the CCEE to pay for substitutes for an extra parent-teacher conference day during the 1992-93 school year. The Chamber of Commerce donated $5,381 to Ottawa River, $9,000 to Raymer, and $6,858 to Westfield during 1993-94.

Business Donations

A considerable amount of office furniture (e.g., desks, cabinets, and room dividers) was donated by the business community to the three schools.

Business Consultants

An advisory committee was established by the CCEE to work with the three site-based schools. This committee of volunteers was made up of three Certified Public Accountants and three other businesspersons. One CPA and one businessperson were assigned to each school.

District School Improvement Program

The district's School Improvement Program has provided services to the site-based managed schools. Four separate sessions were held with Ottawa River, two with Raymer, and one with Westfield during 1992-93. Topics for the Ottawa River sessions have included team development and maintenance, school climate, assessment of progress towards goals, and parental/community involvement in site-based management; topics for Raymer were school climate, activities and goals, team building, and planning; and the topic for the Westfield meeting was school climate. Also, technical assistance was provided to all three schools on Venture Capital Grant applications.

Item Analysis

Item analysis of test scores was requested by at least one of the site-based managed schools, and the district Testing Office provided the item analysis in February, 1994. The analysis was provided to all schools because the computer programming necessary for one school's analysis made it possible to produce analyses for all of the buildings in the district. The item analysis provides subscores by individual students.

Site-Based Building Activities

The site-based schools accomplished many activities in their efforts to implement site-based management. It is not always possible to distinguish activities and events that were the result of site-based management from those that would have occurred without site-based management. Also, the list provided below may not include all that occurred at each site, but most, if not all, of the major activities are gathered below into the categories of instruction-related developments, parent relations, business community involvement, students, and other activities.

Ottawa River

Communication was an area of concern in each of the site-based managed schools. Even though Ottawa River has the smallest number of staff and communication problems should be less of an issue, the building took two steps to increase communication effectiveness: (1) a comprehensive weekly staff bulletin, and (2) a systematic procedure for gathering input for decision-making: (a) ECLT members distribute sheets to other staff members eliciting their suggestions or concerns, (b) the ECLT meets one week before the monthly staff meeting to discuss issues, including those contributed by other staff members, and (c) the monthly staff meeting is held where any issue can be discussed.

Instruction-Related Developments.

Inservice for 1992-93: Team-building, whole language, cooperative learning, math workshop (each teacher attended at least one session and visited a school with site-based management and the whole language approach).

Inservice for 1993-94: Stress management and positive energy flow, integrating content areas across the curriculum, cooperative learning, and computer usage.

Speech teacher teaching language skills

Staff picnic and team-building dinners

Parent Relations.

See for Yourself Community Visitation Day, December 1993

Parent workshops

Otter Outreach published monthly for parents

Membership in Point Place Business Association

Parent/Student Handbook developed and distributed

Held two parent conferences in both years (financial support from CCEE for this in 92-93)

Business Community Involvement.

Career Week

Junior Achievement at all grade levels

Set up student-operated bank in school (partnership with Huntington Bank)

Business volunteers taught students

WGTE/Channel 30 donated computer equipment and software ($5,375).

Active facilitation by business consultant.

Students.

Student Assistance Team

New student council formed (February, 1994)

Believes student behavior problems on decline

After-school fee-based arts program for students at Common Space

Awards given for attendance, academic improvement, honor roll, physical fitness, math.

Young Astronauts program. Student from each grade level selected as VIP of the Week, Student of the Month from each class.

Spirit Week held

Incentives for students

Other.

Selected their own principal

Proposed and received award of five-year, $125,000 Venture Capital grant

Raymer

With an enrollment of 700 students, Raymer is one of the larger elementary schools in the district. In order to better represent the staff and parents and improve communication, Raymer has increased representation on the ECLT to include the principal, assistant principal, instructional coordinator, AFSCME representative, primary coordinator, intermediate coordinator, special education coordinator, three parent representatives, building representative, and special teachers (art, music, physical education) coordinator.

Instruction-Related Developments.

Created additional help for all grades

Inservice on team-building, integrated language arts

Entire staff meets the first week after the school year is over for brainstorming and goal-setting. ECLT meets the following week for planning

Planning meeting held to establish 93-94 goals and objectives

Building sub provided release time for coordinators to complete interactions with other teachers during day and for grade level teacher planning

Established resource room for teacher materials

Parent Relations.

Parent Volunteer Coordinator, volunteer orientation, and volunteer training established (posted list of parent volunteers who have been trained on school participation)

Parent workshops

Teacher release program for home visits and special meetings with parents

Business Community Involvement.

Mentor program with Dana Corporation

Students.

After School Academic & Activity program with over 250 participants

Student of the Month Luncheon, Awards Assembly, Principal's Pride bulletin board, Brass Apple and Crystal Apple awards for teachers and staff, instituted

Raymer student newspaper started

Funding of $100 per teacher for behavior incentives

Four career days held

In-school suspension program.

Student Assistance Team

Other.

Petitioned ODE for adjusted day, proposed Venture Capital grant

Involved all staff in budgeting decisions

Abolished monthly staff meetings

Completed mission and procedures document

Westfield

Westfield Elementary School is a middle-sized elementary school in the Toledo district and has the highest minority student representation of the three site-based managed schools. Westfield has taken a unique approach to developing parent and community relations by establishing a Family Support Team. This team consists of two parents, each of whom are employed by Westfield at 20 hours per week. The team maintains an office in the building and holds regular meetings with small groups of parents.

Instruction-Related Developments.

All day kindergarten, three days a week (Monday-Tuesday-Thursday, Monday-

Wednesday-Friday).

Additional art specialist time

Contracted with Toledo Museum of Art for art and music

Inservice on whole language, team-building, and self-esteem

Reduced primary class size

Parent Relations.

Family Support Team

Parent Involvement Workshops

Planning meetings held to organize Westfield Parent Organization.

Students.

Started a student council

Formed a Hispanic club

Other.

Had two-year waiver request approved by ODE to begin school 15 minutes early each day and reduce eight days of student attendance from the calendar.

Landscaped front yard.

Study of Teacher Perceptions

Survey

The teachers at the three site-based managed schools were surveyed to determine their perceptions concerning statements related to the goals set forth in their proposals. A total of 52 teachers participated in the survey, approximately 98% percent of the population of classroom teachers across the three schools.

Instrument

The survey form was developed by identifying the main components of the proposals generated by the respective schools. These statements were collated and compared across schools to determine commonalities from the three proposals. These common elements were then converted to statement form. The following instructions were also provided:

> Please read each item carefully and indicate the extent to which you feel a mechanism is available in your school to address the issue(s) presented in the statement. Thus, reflect on the procedures available, and circle the comment which best represents the conditions in your school (from Formal Mechanisms to Your Sole Initiative) for each problem

statement. In addition, please check whether or not the procedure has been recently added and include any comments you might care to make regarding the process or procedures.

Essentially, the survey form reflects specific concerns in four general categories: Governance, Participation, Inclusion for all parties in the educational process, and Accountability. By condensing and cross-referencing the three proposals, element by element, a 20-item instrument was constructed with two teacher responses collected for each statement. The first response required the teachers to choose the extent to which procedures were available in their school to address the issue raised from a three-point scale (formal procedures, informal procedures, or solely my initiative). The second response required the teachers to indicate if the procedures had been recently developed.

All instruments were completely anonymous, during both completion and collection. Addressed, postage-paid envelopes were provided for the return of the survey instruments.

Reliability

The results of a reliability analysis performed on the data (alpha=.84) indicated a satisfactory level of instrument reliability.

Results

Items and Tallies. The results of the survey are presented at Appendix A, Survey Response Tallies and Percentages, Overall and School. Responses for each item are tallied, first as an overall score, using the categories listed at the top of the form, followed by a breakdown for each individual school. Percentages of each tally are located in the column to the right of the tally. Using the first item as an example, 34, or 72%, of all respondents indicated that formal procedures were available, 11, or 23%, indicated that only informal procedures were available, and 2, or 4%, responded that any action was "solely at my initiative." Thirty-seven, or 79%, of the respondents indicated that the procedures described in the statement were recently added.

The high percentages in the New column indicate that site-based management status has had a considerable impact on the three participating schools. For all twenty items, 47% of the teachers responded that the procedures were New. Forty-five percent of the Raymer teachers, 51% of the Ottawa River teachers, and 37% of the Westfield teachers indicated that the procedures described in the twenty statements were new.

The percentage of teachers indicating formal procedures were in place was below the individual building average for each of the three buildings for the items listed below. Each of the schools recorded a lower than average percentage in the New column for Items 10, 12, 17, 18, and 19. Raymer and Westfield recorded a lower than average percentage in the New column for Item 16.

10. (principal is aware of rationale for decisions implemented in your classroom),

12. (regular access to other staff who have faced classroom problems similar to yours)

16. (process for establishing roles, responsibility, and accountability between home and school)

17. (would like to share techniques which appear effective with others)

18. (secure greater parental involvement with children presenting learning or behavioral problems),

19. (greater coordination between programs for special children and those for the general student population).

The percentage of teachers in each of the three buildings indicating formal procedures were in place was above the building averages for Items 1, 4, 6, 7, 8, 9, and 13. All of the schools had a higher than average percentage in the New column for Items 1, 4, 6, 7, 8, and 9. Raymer and Westfield had higher than average percentages for Item 13.

1. (increase collaboration with other staff to discuss school programs or procedures),

4. (increase involvement with the business community to enhance school programs),

6. (request release time for staff development programs or coursework),

7. (access to a cooperative planning mechanism, which includes parents, community members, teachers, and administration),

8. (like input to and feedback from person(s) making decisions about budgets, curricular matters, etc.),

9. (say in designing resource/inservice programs that are geared to the particular problems and needs of your school),

13. (mechanism for incorporating business/professional input established in your school).

Factor Analysis. Items relating to Governance, Participation, Inclusion for all parties, and Evaluation were developed for the instrument. However, after conducting factor analysis on the

response data, seven clusters of items were identified. These clusters of items were labeled as: Sharing Expertise, Items 12, 17, 18, and 19; Participation, Items 1, 7, and 8; Accountability, Items 10, 16, and 20; Building/Principal Relations, Items 5 and 14; Building Governance, Items 3 and 11; External Involvement, Items 4 and 15; and Gaining Time, Items 2 and 6.

Mean Scores. Mean scores and standard deviations were computed for the items gathered under each of the factors as seen in Table 4. A higher mean score indicates a perception of greater availability of a mechanism for accomplishing the statements clustered under the seven factors. Raymer had the highest mean score for the Participation, Sharing Expertise, Gaining Time, and External Involvement factors. Ottawa River had the highest mean score for the Building Governance, Accountability, and Principal Control factors. Westfield had the low mean score for each of the factors.

Table 4. Mean Scores and Standard Deviations

	Mean	Standard Deviation
Sharing Expertise	1.91	.72
Raymer	2.05	.73
Ottawa River	1.85	.81
Westfield	1.75	.63
Participation	2.35	.76
Raymer	2.57	.61
Ottawa River	2.22	.88
Westfield	2.10	.82
Accountability	1.77	.76
Raymer	1.88	.66
Ottawa River	1.89	1.00
Westfield	1.52	.69
Building/Principal Relations	2.38	.72
Raymer	2.46	.75
Ottawa River	2.50	.60
Westfield	2.16	.75
Building Governance	2.34	.74
Raymer	2.41	.75
Ottawa River	2.65	.63
Westfield	2.09	.76
External Involvement	2.41	.69
Raymer	2.66	.50
Ottawa River	2.42	.79
Westfield	2.03	.72
Gaining Time	2.51	.72
Raymer	2.81	.75
Ottawa River	2.25	.60
Westfield	2.25	.75

Kruskal-Wallis ANOVA. A Kruskal-Wallis one-way analysis of variance was conducted to examine whether teachers' perceptions about the availability of formal mechanisms differ among the three buildings. Kruskal-Wallis one-way ANOVA is the non-parametric analog to parametric univariate one-way ANOVA and is considered appropriate for ordinal data with more

than two samples. To compare the teachers' perceived availability of formal mechanisms in terms of Sharing Expertise, Participation, Accountability, Building/Principal Relations, Building Governance, External Involvement, and Gaining Time among the three buildings, aggregated scores were generated by the summation of item scores for each of the factors. Higher scores indicate more availability of the formal mechanism in the building perceived by the teachers. The results are presented in Table 5.

From Table 5 it can be seen that the Raymer teachers differed significantly from the Ottawa River and Westfield teachers in their perceptions about the availability of mechanisms that enhance Gaining Time (.0063 level). As one teacher from Raymer noted, "I've never had problems getting a parent to help but now we have a posted list of parent volunteers who have been inserviced on school participation." Raymer teachers also differed significantly in their perceptions of External Involvement (.0254 level).

The differences in Participation, Sharing Expertise, Building Governance, Accountability, and Building/Principal Relations were not statistically significant among teachers of the three buildings. However, the observable differences among the three groups are by no means negligible. Specifically, Raymer scored the highest in six of the seven dimensions, while Westfield scored the lowest in all of the dimensions except for the factor Gaining Time, in which Westfield's score was only slightly higher than Ottawa River's score. Ottawa River scored highest on the Building Governance factor. As one of the Ottawa River teachers wrote, "We are all included plus we have elected representatives that ask for our input and keep us informed." Ottawa River was slightly lower than Raymer on the Accountability and Building/Principal Relations factors, and had the lowest score on the Gaining Time factor. Westfield had the lowest or near lowest mean rank score on all factors.

Table 5. Kruskal-Wallis One-Way ANOVA for Factor Scores

	Mean Rank	Chi-Square	Significance, Chi-Square
Sharing Expertise			
Raymer	29.33	1.6850	.4306
Ottawa River	25.25		
Westfield	23.19		
Participation			
Raymer	30.83	4.1626	.1248
Ottawa River	25.17		
Westfield	21.00		
Accountability			
Raymer	28.43	2.7241	.2561
Ottawa River	28.04		
Westfield	20.97		
Building/Principal Relations			
Raymer	28.60	2.4520	.2935
Ottawa River	28.50		
Westfield	21.84		
Building Governance			
Raymer	25.66	4.0904	.1294
Ottawa River	30.30		
Westfield	19.28		
External Involvement			
Raymer	29.48	7.3433	.0254
Ottawa River	26.25		
Westfield	17.43		
Gaining Time			
Raymer	33.04	10.1322	.0063
Ottawa River	20.83		
Westfield	20.94		

Baseline Data

Purpose

Baseline data is presented in this section on student attendance, teacher attendance, student achievement, and student suspensions and expulsions. These data can be used as indicators of school performance during, and at the conclusion, of the three-year program. The three site-

based managed schools vary in size, as indicated by their enrollment levels in Table 6. Raymer is one of the larger elementary school buildings, Westfield is a middle-sized elementary building, and Ottawa River is the elementary building with the lowest enrollment.

Student Attendance

In the 1991-92 school year, Ottawa River had the highest student attendance rate, followed by Raymer, and then Westfield. In the 1992-93 school year, the first year of site-based management, all three schools showed improvement in their student attendance rates. When compared to the preceding year, Westfield had the greatest change, 1.2%; Raymer had the next greatest change, .55%, and Ottawa River had the smallest change, .2%. However, the attendance rate for all elementary schools improved 1.32% over the same period.

Table 6. Student Attendance Rate at Site-Based Managed Schools and All Elementary Schools, 1991-93

	Ottawa River	Raymer	Westfield	All Elementary
Enrollment, 1992-93	228	700	428	22,969
Student Attendance Rate, 1991-92	96.2	93.5	92.7	93.2
Student Attendance Rate, 1992-93	96.4	94.1	93.9	94.6
Change	0.2	0.6	1.2	1.4

Teacher Attendance

As seen in Table 7, teacher attendance at the Ottawa River elementary school was above the district average for elementary schools in the year prior to implementation of site-based management (1991-92); Raymer was also above the average, and Westfield was below the average. During the first year of site-based management (1992-93), the teacher attendance rate for Ottawa River and Raymer declined, and Westfield remained unchanged. Ottawa River had the greatest decline.

Table 7. Teacher Attendance Rate at Site-Based Managed Schools and All Elementary Schools, 1991-93

	Ottawa River	Raymer	Westfield	All Elementary

Teacher Attendance Rate, 1991-92	.97	.95	.92	.93
Teacher Attendance Rate, 1992-93	.92	.94	.92	.93
Change	-.05	-.01	.00	.00

Student Achievement

Achievement scores in reading, math, and language for students in grades one through five as measured by the Metropolitan Achievement Test are presented in Table 8. The achievement test was administered in March of 1992 and again in March, 1993. The national mean is 50 for all of the subject areas tested; similarly, the district mean for each of the areas tested is slightly above 50. The mean score for Ottawa River students was 60 or more in Reading and Math during both years, and 55 or more in Language during the two years. Raymer was above 50 in all areas during the first year under observation, but fell slightly below 50 in Language during the second year. Mean scores for Westfield ranged from 42.0 to 48.5 during the two years. Mean scores in 1993 for all three of the schools declined from scores in the comparison year, 1992, except in the case of the score for Westfield in Language, where an improvement of 1.7 was found.

Table 8. Comparison of Mean Normal Curve Equivalent Scores of Grades 1-5 in Site-Based Managed Schools on the Metropolitan Achievement Test -- March 1992 and March 1993

	Ottawa River	Raymer	Westfield	All Elementary
Reading 3/92	62.7	53.0	45.1	50.7
Reading 3/93	60.4	52.1	44.7	50.6
Reading Change	-2.3	-0.9	-0.4	-.1
Math 3/92	62.0	60.0	48.5	52.8
Math 3/93	60.8	58.5	48.3	53.1
Math Change	-1.2	-1.5	-0.2	0.3
Language 3/92	57.5	50.2	42.0	49.7
Language 3/93	55.9	49.6	43.6	51.6
Language Change	-1.6	-0.6	1.7	1.9

Suspensions and Expulsions

Student suspensions and expulsions at the site-based managed schools were compared for the 1991-92 and 1992-93 school years (Table 9). Combined student suspensions declined from 238 during 1991-92 to 224 in 1992-93, and student expulsions declined from 7 to 3. Suspensions increased from eight in 1991-92 to twelve in 1992-93 at Ottawa River, and there were no expulsions in either year. Suspensions at Raymer declined from 161 to 136, and expulsions declined from five to three. Suspensions at Westfield increased from 69 to 76, and Westfield expulsions declined from two to zero.

Table 9. Student Suspensions and Expulsions at Site-Based Managed Schools, 1991-93

	Ottawa River	Raymer	Westfield	Total
Suspensions, 1991-92	8	161	69	238
Suspensions, 1992-93	12	136	76	224
Expulsions, 1991-92	0	5	2	7
Expulsions, 1992-93	0	3	0	3

Site-Based Management Review Committee

The Site-Based Management Review Committee (SBMRC) was established by the trust agreement to make recommendations on site-based management issues through the superintendent to the school board. The site-based buildings brought issues to the SBMRC. The issues are listed below in categories of calendar, funding, collective bargaining agreements, site authority, and other.

Calendar

Change day of parent-teacher conferences (1992-93) from Thursday and Friday to Wednesday evening, Thursday, Thursday evening, and no school on Friday (Westfield). Action: Approved.

Bank 15 minutes a day to generate eight released days (Westfield). This required a waiver from the Ohio Department of Education Minimum Standards. SBMRC (with strong support by CCEE representative) encouraged a request for the waiver. Action: Approved by ODE as two-year pilot (1993-95). (Raymer made a similar proposal to ODE. Action: Not approved.)

Stagger kindergarten arrival to first day of school so that orientation can occur (Ottawa

River). Action: Approved.

Funding

Increase petty cash maximum from $100 to $200 (Westfield). Action: Denied (would be in conflict with Ohio Revised Code).

SBMRC affirmed that unused funds can be carried over to new fiscal year. Action: Information.

Ottawa River has smaller student enrollment but larger amount in budget for building operator supplies (Westfield). Action: None.

Requests for additional funding for Fiscal Year 1994. Action: Increase of 10% over FY 93 amount.

Additional parent-teacher conference day wanted but will cost $1,800 (Ottawa River). Action: CCEE provided funds for substitutes.

Collective Bargaining Issues

Site-based managed buildings want to select AFSCME staff when vacancies occur. Action: Seniority prevails.

Protect non-certified staff at site-based managed schools from "bumping" by more senior employees (Westfield, concern at other sites also). Action: Not approved.

"Excessive scrutiny" of site-based managed schools. Reference to grievance against Raymer principal for loss of work due to subcontracting. Raymer paid $32 for typing of musical score. Grievance came from outside of building. Action: None.

Must add paraprofessional representation to CLT before Glendale-Fielbach proposal for site-based management status is considered (TFT). Action: TAAP and AFSCME did not agree with proposal.

Site Authority

Out-of-district transfer made by central office (Ottawa River). Action: No out-of-district transfers unless CLT approves.

Central only calls two substitutes for Raymer when three are needed because Raymer has a full-time building substitute. Raymer wants this practice stopped. Action: Approved.

WICAT lab installed without notice or approval (Westfield). Action: None.

Other

University of Toledo is providing a four-quarter hour course on site-based management during Spring Quarter, 1993. Action: Information.

Request for item analysis of Metropolitan Achievement Test scores. Action: Being developed.

Instructional coordinators in need job description and time for duties. TFT, TAAP, site-based principals, and the three instructional coordinators met to determine released time and pay for instructional coordinators in mid- to late-May, 1993. Action: Westfield and Ottawa River given additional substitute day per week. Raymer was not given an additional day because they already had a full-time building substitute. Raymer was given an additional $8,000.

Discussion and Recommendations

Areas of Progress and Lagging Areas

According to the survey responses, the buildings have made progress in establishing mechanisms for increasing collaboration, involvement with the business community, release time, cooperative planning, inservice, and business input relative to other areas.

The areas where progress toward the proposed goals is lagging are processes for principal learning about rationales for classroom decisions, regular access to staff who have faced similar problems, process for establishing home and school relations, sharing techniques, greater parental involvement with children with learning or behavioral problems, and greater coordination between programs for special children and other children. Progress cannot be made in all areas simultaneously. Perhaps goals related to the areas of progress were assigned higher priority by the CLTs. Recommend that buildings reexamine goals that relate to each of the lagging areas and consider revising their plans for attaining them.

Site-Based Management Review Committee

Perhaps out of concern that the site-based schools would perceive recommendations as attempts to exercise centralized control, the SBMRC, as defined in the trust agreement, has largely limited its function to responding to problems brought to it by the site-based schools. The committee has demonstrated support for the site-based managed schools by taking positive action on nearly all of the concerns presented by the schools. However, in recognition of the

criticality of support to the site-based schools, the SBMRC should expand its function beyond reacting to the concerns of the site-based schools. Recommend that the SBMRC determine how it can become more proactive in supporting the site-based managed schools.

Baseline Data and Implementation

The baseline data were selected as indicators of school performance. The data (Tables 6, 7, 8, and 9) did not reveal significant change in any area.

There was widespread agreement among the signatories of the trust agreement that the most important of the performance indicators concerns achievement. Almost all of the activities implemented at the three sites have the potential of some degree of indirect beneficial impact on student achievement. Yet, site-based management alone does not include a theory or method for translating governance changes into improved student performance. Perhaps the most obvious linkage between site-based management and the teaching and learning process is in the ability to select time and topics for inservice. For instance, Ottawa River and Westfield have had inservice programs on whole language, and Raymer has had an inservice program on integrated language arts. If the inservice programs are instrumental in improving instruction, then student achievement may show significant gains in that area.

Interestingly, students may be learning more (or less), but if the test does not measure the difference in learning, then the scores will not show a difference either. Analysis of the curriculum and test objectives often reveals a mismatch between instructional objectives and testing objectives. Perhaps the district has conducted a curriculum audit; even so, the board-approved curriculum is probably not taught uniformly in every classroom, and to the extent that it varies, it may be misaligned with the achievement test. Recommend that the buildings determine the extent of alignment of their taught curriculum with the Metropolitan Achievement Test.

Funding

The site-based managed schools received over $150,000 in additional funding for the 1993-94 school year. As the district has an impending budget deficit, its willingness to provide financial support to the project is commendable. Still, the district does not have the financial means to provide additional funding if more than a few sites are added to the site-based project. Ottawa River, Raymer, and Westfield each spent over half (52%, 71%, and 66%, respectively) of

their available funds (discretionary and additional combined) on personnel (e.g., substitute teachers; art, music, and speech teachers). This released teachers from their classrooms for instructional coordination duties, grade level and department planning meetings, home visits, etc. Recommend that the district and union leadership collaborate in identifying low-cost or no-cost alternatives that would provide teachers with opportunities for collaboration with one another and with parents.

AFSCME Bumping

The trust agreement required that an AFSCME member serve on the CLT. Each of the buildings has gone beyond the trust agreement requirement by inviting AFSCME staff to participate as a team member in other activities, and there is evidence of positive relationships among AFSCME staff members, teachers, and the principals in each of the buildings. Perhaps if there had been site-based managed schools when the collective bargaining agreement was developed, there would be different language governing AFSCME "bumping." As it is, it seems ironic that the site-based schools are able to select their own teachers and administrators but are unable to protect their AFSCME team members from being replaced by more senior AFSCME members. This practice is inconsistent with team-building efforts and the basic principle of site management. Recommend that parties to the collective bargaining agreement work toward eliminating bumping of AFSCME members from site-based managed schools.

Other Collective Bargaining Issues

Although AFSCME members in the buildings did not originate them, complaints were lodged against the site-based managed schools by AFSCME. The boiler operators' union has not signed the trust agreement. The TFT insisted upon representation of the paraprofessionals on the Glendale-Fielbach CLT. In each instance the union acted legitimately in its own interest; yet, site-based management, as defined in the trust agreement, requires collaboration. A primary condition for collaboration is working toward mutual goals. Given that adversarial relationships that may have developed in past years are interfering with mutuality, recommend that union leadership be invited to join in a continuing dialogue about site-based management's effect on their mutual interests.

Business Consultants

The advisory committees established by the CCEE for each site were made up one Certified

Public Accountant and one businessperson. With one striking exception, this resource may have fallen short of expectations. The school staff may not have known what requests or demands to make of their business consultants, and the consultants may not have known how they could assist the school. Recommend that the CCEE and CLTs exchange their views on how business consultants could be better utilized in the future.

Spending

As the site-based buildings used their discretionary spending authority, they encountered difficulty with the purchasing system and with the petty cash accounting system.

All three principals complained about the length of the purchasing process. The treasurer suggested that they obtain a purchase order from the treasurer's office over the telephone. The principals can then call the vendor, place their order, and tell them that a written purchase order will follow. The principals had not been aware of this process, which had been in effect for many years.

Principals were unfamiliar with the use of the petty cash fund. A misunderstanding arose over the need to inform the treasurer's office that there was no activity during the month. The treasurer's office produced a pamphlet on "How to Handle Petty Cash."

In both instances the flow of communication between the principals and the treasurer's office was increased, and the principals improved their ability to use the accounting system. Principals in other buildings will benefit from the petty cash pamphlet and, hopefully, other principals also learned that they may call for a purchase order number. Recommend that non-site-based managed buildings be given site control over discretionary funding.

Communication and Participation in Decision-Making

While the survey responses indicated that teachers perceived that mechanisms for collaboration, participation, and cooperative planning were established, relative to other processes; there is need for further attention to these areas. During our interviews of faculty and other staff, we found people in each of the buildings who were positive, even enthusiastic about site-based management. Invariably, these were people who were participating in decision-making. The people we interviewed who were negative toward site-based management, just as invariably, felt excluded from the decision-making process. In other instances, staff members questioned the authority of teachers to make unilateral decisions that may have been made by the

principal in the past. This suggested that a consensus about authority to make decisions had not been formed. In some instances where staff were unhappy about participation, we thought it possible that the staff member was not well informed about the situation. In one of the buildings, we learned of a fair amount of discontent concerning the decision-making process. Receiving information and participating in decision-making both depend on communication channels being available and open. CLT members have an obligation to be in regular two-way communication with as many other staff members as possible. Recommend that each CLT use a systematic means of identifying the issues that staff members wish to participate in deciding. Recommend that each teacher and staff member receive information about situations that they might be expected to have an interest in and be encouraged to participate in decisions that affect them. Recommend that CLTs examine channels in the building that are used for communication and decision-making.

Training for Site-Based Management

Site-based management, as indicated in the preceding paragraph, calls traditional roles, responsibility, and authority into question. The principals and staff at the three schools did not have sufficient lead time to prepare for their new roles. This contributed confusion to the implementation process and impeded its progress. The trust agreement calls for the establishment of a Site-Based Management Academy for training of future Collaborative Leadership Teams. Recommend that the Site-Based Management Academy be established and that the academy's mission include preparing all staff members of prospective site-based managed schools.

Inservice Training

Staff at all three schools have received an unusual amount of inservice training. Topics have included team building, whole language, integrated language arts, self-esteem, cooperative learning, math manipulatives, stress management, computer usage, and integrating content areas across the curriculum. New knowledge and skills are essential for acting out new roles and for employing new instructional strategies. Recommend that efforts to acquire new knowledge and skills through inservice and consultants be maintained, and perhaps increased.

Time for Implementation

The trust agreement is in effect for three years unless all parties agree to extend it. It is likely

to take five or more years to fully implement site-based management. Recommend that the trust agreement be extended to five years.

Appendix A
Survey Response Tallies and Percentages, Overall and School

1. You would like to increase your collaboration with other staff to discuss school programs or procedures.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	34	72%	11	23%	2	4%	37	79%
Raymer	21	91%	1	4%	19	4%	19	83%
Ottawa River	6	67%	3	33%	0	0%	8	89%
Westfield	7	47%	7	47%	1	7%	10	67%

2. You would like to increase parental/volunteer involvement in your classroom.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	35	69%	20	20%	6	12%	27	53%
Raymer	22	92%	2	8%	0	0%	18	75%
Ottawa River	6	55%	4	36%	1	9%	4	36%
Westfield	7	44%	4	25%	5	31%	5	31%

3. You would like to consult with the principal regarding school goals and objectives.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	32	73%	7	16%	5	11%	36	82%
Raymer	16	84%	2	11%	1	5%	13	68%
Ottawa River	9	100%	0	0%	0	0%	7	78%
Westfield	7	44%	5	31%	4	25%	2	13%

4. You would like to increase involvement with the business community to enhance school programs.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	37	82%	7	16%	1	2%	36	80%
Raymer	21	96%	1	4%	0	0%	18	82%
Ottawa River	8	80%	2	20%	0	0%	8	80%
Westfield	8	62%	4	31%	1	8%	10	77%

5. You would like to have a mechanism available to address disagreements occurring between you and school administrators.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	34	69%	8	16%	7	14%	7	14%
Raymer	15	65%	14	17%	4	17%	3	13%
Ottawa River	8	73%	2	18%	1	9%	2	18%
Westfield	11	73%	2	13%	2	13%	2	13%

6. You would like to request release time for staff development programs or coursework.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	40	87%	4	9%	2	4%	24	52%
Raymer	21	95%	1	5%	0	0%	12	55%
Ottawa River	9	100%	0	0%	0	0%	4	44%
Westfield	10	67%	3	20%	2	13%	8	53%

7. You would like access to a cooperative planning mechanism, which includes parents, community members, teachers, and administration.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	28	62%	10	22%	7	16%	32	71%
Raymer	16	71%	5	24%	1	5%	15	71%
Ottawa River	7	70%	1	10%	2	20%	9	90%
Westfield	6	43%	4	29%	4	29%	8	57%

8. When decisions regarding budgets, curricular matters, etc., are made, you would like input to, and feedback from, the person(s) making the decisions.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	38	78%	7	14%	4	8%	35	71%
Raymer	20	83%	3	13%	1	4%	16	67%
Ottawa River	10	91%	1	9%	0	0%	9	82%
Westfield	8	57%	3	21%	3	21%	10	71%

9. You feel that resource/inservice programs and personnel should be geared to the particular

problems and needs of your school, and you would like to have a say in designing these programs or selecting the personnel.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	36	77%	7	15%	4	9%	37	79%
Raymer	16	73%	4	18%	2	9%	15	68%
Ottawa River	9	82%	1	9%	1	9%	10	91%
Westfield	11	79%	2	14%	1	7%	12	86%

10. You would like to insure that the principal is aware of the rationale for decisions implemented in your classroom.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	13	27%	16	33%	20	41%	10	20%
Raymer	6	26%	9	39%	8	35%	5	22%
Ottawa River	3	27%	4	36%	4	36%	2	18%
Westfield	4	27%	3	20%	8	53%	3	20%

11. You would like to have your input regularly solicited and used in building policy and decision processes.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	27	59%	11	24%	8	17%	17	37%
Raymer	13	59%	5	23%	4	18%	8	36%
Ottawa River	8	89%	1	11%	0	0%	5	56%
Westfield	6	40%	5	33%	4	27%	4	27%

12. You would like regular access to other staff who have faced classroom problems, issues, etc., similar to yours to compare notes.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	18	35%	16	31%	18	35%	13	25%
Raymer	9	38%	8	33%	7	29%	8	33%
Ottawa River	4	33%	2	17%	6	50%	2	17%
Westfield	5	31%	6	38%	5	31%	3	19%

13. You would like a mechanism for incorporating business/professional input established in your school.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	33	75%	5	11%	6	14%	25	57%
Raymer	19	86%	2	9%	1	5%	13	59%
Ottawa River	6	67%	1	11%	2	22%	5	56%
Westfield	8	62%	2	15%	3	23%	7	54%

14. You would like the principal to be more involved in setting school guidelines.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	37	84%	4	9%	3	7%	18	41%
Raymer	20	95%	0	0%	1	5%	9	43%
Ottawa River	9	82%	2	18%	0	0%	6	55%
Westfield	8	67%	2	17%	2	17%	3	25%

15. You would like to see the parents of children enrolled in the school to have access to a formal document/handbook which outlines the school mission and procedures.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	28	65%	11	26%	4	9%	21	49%
Raymer	14	70%	4	20%	2	10%	9	45%
Ottawa River	10	100%	0	0%	0	0%	8	80%
Westfield	4	31%	7	54%	2	15%	4	31%

16. You would like to develop a process for establishing roles, responsibility, and accountability between home and school.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	18	40%	11	24%	16	36%	18	40%
Raymer	8	38%	6	29%	7	33%	7	33%
Ottawa River	7	64%	1	9%	3	27%	7	64%
Westfield	3	23%	4	31%	6	46%	4	31%

17. You have developed techniques which appear effective with certain children, and would like to share these procedures with others.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	14	28%	14	28%	22	44%	9	18%
Raymer	8	35%	7	30%	8	35%	7	30%
Ottawa River	3	25%	3	25%	6	50%	1	8%
Westfield	3	20%	4	27%	8	53%	1	7%

18. You would like to secure greater parental involvement with children presenting learning or behavioral problems.

	Formal Procedures.		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	25	52%	8	17%	15	31%	10	21%
Raymer	12	55%	5	23%	5	23%	5	23%
Ottawa River	6	60%	0	0%	4	40%	0	0%
Westfield	7	44%	3	19%	6	38%	5	31%

19. You would like to see greater coordination between programs for special children and those for the general student population.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	19	43%	14	32%	11	25%	13	30%
Raymer	11	52%	7	33%	3	14%	9	43%
Ottawa River	4	33%	4	33%	4	33%	1	8%
Westfield	4	36%	3	27%	4	36%	3	27%

20. You would like to have a detailed manual outlining responsibilities and accountability for teachers and administrators.

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	19	48%	10	25%	11	28%	9	23%
Raymer	9	47%	6	32%	4	21%	0	0%
Ottawa River	6	75%	1	13%	1	13%	8	100%
Westfield	4	31%	3	23%	6	46%	1	8%

Total Scores for All Items

	Formal Procedures		Informal Procedures		My Initiative		New	
	Tally		Tally		Tally		Tally	
Overall Score	565	61%	191	21%	172	19%	434	47%
Raymer	297	64%	92	20%	78	17%	209	45%
Ottawa River	138	67%	33	16%	35	17%	106	51%
Westfield	131	46%	76	27%	77	27%	105	37%

Appendix B
Site-Based Management Plan

TOLEDO PUBLIC SCHOOLS

SEPTEMBER, 1991

SITE-BASED MANAGEMENT PLAN

INTRODUCTION

While the Toledo Public Schools' moves towards the development and implementation of a site-based model, several facts must be recognized by both the employees of the school district and those community members who are sponsoring this movement. First, while site-based management has become one of the two key empowerment issues endorsed by the most recent group of educational reformers, it must be recognized that site-based management alone is not sufficient to solve all the complex problems faced by today's schools and families. Second, while site-based management offers many potential benefits, e.g., increased staff ownership, shortened time lines for decision making, increased faculty interest in professional development, and increased building level accountability; there are also many potential pitfalls to site-based management, e.g., unhealthy competition among schools for fixed resources, a decrease in school district accountability, school buildings focusing solely on such easily measured outcomes as standardized test scores, and school buildings becoming the political battlegrounds for noneducational, neighborhood agendas. Third, site-based management has the potential of increasing operating costs in large school districts. Factors that can lead to increasing costs are: the need to duplicate within each school functions that were formally controlled centrally, examples being personnel, purchasing, and student data; the need to provide site-based administrators and teachers with intensive training in noneducational management skills; the requirement for the district to develop a comprehensive monitoring system that quickly targets and intervenes with site-based buildings that are not working; and the development of educational alternatives for students that cannot, or will not, be served by site-based schools.

Taking the above mentioned positives and negatives of site-based management into consideration, the Toledo Public Schools is making several recommendations regarding the development and implementation of a site-based management model.

RECOMMENDATIONS

DISTRICT GOALS--The Toledo Public Schools will continue to formulate both annual and strategic goals. These goals will define for both the school buildings and the community those areas where the school district is striving for improvement and how success will be determined.

SCHOOL GOALS--All Toledo Public school buildings, site-based or not, will generate annual building goals. These building goals should support the strategic goals of the school district. Administrators, teachers, parents, and students will be involved in each building's annual needs assessment and subsequent generation of goals.

DECISION MAKING--School buildings will have decision making procedures developed through discussions with appropriate constituencies. These

procedures will delineate the roles of administrators, teachers, and support personnel in the decision making process along with the degree of involvement of parents and students.

STAFFING--In order to reduce duplication of effort as much as possible, all potential employees will be screened by the school district's Personnel Office. When a site-based pilot building requires either certified or noncertified staff, the Personnel Office will forward a list of qualified candidates to the building. Each pilot site will establish an interview schedule and select the best candidate based upon building developed policies.

BUDGET--General fund dollars will be allocated to each pilot site based upon a formula which will include factors that allow additional funding to go to schools who have high percentages of at-risk youth. These dollar allocations will be utilized by the schools for supplies, materials, equipment, and library books. Noninstructional support services such as maintenance, transportation, data processing, food service, payroll, purchasing, capital outlay, and other district-wide categories will remain centralized. Pilot sites that expand all allocation funds prior to the close of the school year will lose their site-based status, buildings who end the year with a surplus will have these dollars added to their next year's allocation.

Categorical funds from state or federal sources will be allocated to the pilot site based upon the funding source's guidelines.

INSTRUCTION--Due to the school district's high rate of student mobility as well as Ohio Department of Education Minimum Standards regarding curriculum, the review and refinement of the Toledo Public Schools' Course of Study and related text book adoptions will be handled centrally. Individual schools, from budgeted monies, may select books and materials to enhance the instructional process. Teachers and administrators will continue to provide input in district-wide curriculum development and text book selection processes.

EVALUATION--Each site-based management site will have a formative and summative evaluation. The formative evaluation will review the effectiveness of such development and implementation processes as goal setting, educational design, community and staff involvement, and budgeting. The summative evaluation will review the extent to which each school achieved both its and the school district's goals.

REFORMING THE REFORMED--In all probability, evaluation results will show that some site-based pilot sites are <u>not</u> working. In order to limit the negative educational effects on the students of these identified sites, the school district must have immediate educational alternatives for these schools and students.

SCHOOL CALENDAR AND SCHOOL DAY--Site-based management schools should have the ability to adjust the school calendar and the school day to best meet the needs of students, parents, and staff. Such adjustments must stay within the school's budget and address the transportation needs of individual students.

CHOICE--For several years, the Toledo Public Schools has had a modified Choice program through the Out-of-district Transfer program. While this program has worked well, it is suggested that before the school district eliminate the neighborhood school completely through the institution of an unrestricted choice option, that further educational research on the educational benefits and drawbacks of Choice be completed.

DEFINITION AND PLAN--The Superintendent of Schools should convene, during the Fall of 1991, a committee composed of school personnel, labor leaders, and community leaders for the purpose of defining site-based management and developing the local pilot program. It must be recognized that a Toledo pilot will only be successful if these groups accept ownership and work cooperatively. The pilot should consist of 3 to 5 schools becoming operational in the Fall of 1992. Based on the evaluations of the pilot schools, additional achools may be added for the 1993-94 school year.

CC/REVISED-10/22/91

Appendix C
Educational Trust Agreement/Shared Decision-Making

EDUCATIONAL TRUST AGREEMENT

SITE-BASED MANAGEMENT/SHARED DECISION MAKING

The following Memorandum of Understanding entered into by the undersigned defines the roles and responsibilities of professional and non-teaching staff in the establishment and operation of site-based managed elementary schools.

1. The primary purpose of site-based management shall be to improve student performance. A secondary purpose will be to test new roles and responsibilities in a restructured site-based management organization.

2. Each site-based managed school will establish school goals, budgets, instructional organizations, and other operational procedures through collaborative decision making. A Collaborative Leadership Team will be made up of the principal, instruction coordinator and non-teaching representative. Other personnel may be added as deemed appropriate by the team.

3. The principal will provide leadership within the site-based managed school with his/her primary objective being the establishment of an environment which will promote maximum growth for each student. The responsibility for implementing the instructional goals and practices shall reside with the teachers through the Instructional Coordinator after collaborative participation by the team. The principal will attend and participate in curriculum and instructional conferences.

4. The Instruction Coordinator, with the assistance of a Primary Level Department representative and Intermediate Level Department representative, will be responsible for the areas of concern pertaining to implementing the building's instructional goals and objectives. Some of these areas are: supplemental textbook/instructional materials, methods of instruction, grouping of students, reporting systems and similar learner oriented issues.

5. A Site-Based Management Review Committee will be composed of the Superintendent and one representative from TFT, TAAP, and AFSCME. There will be an ex-officio member from the Community Coalition for Effective Education (CCEE). Additional advisory members may be added as appropriate. The Review Committee will make recommendations through the Superintendent pertaining to individual school site-based management projects. The Superintendent will take the recommendations to the Board of Education. The Board of Education will make the final decision on each site-based management project. The recommendations made by the Review Committee will include, but not be limited to, the following areas: selection of project schools proposals, development of initial inservice programs, determination of amount of discretionary money allocated to each site (See #6 for definition of discretionary money), speed of expansion of sites and review of the evaluation plan.

   The Collaborative Leadership Team at individual schools may bring problems to the Review Committee for suggestions and/or resolution. The Review Committee will not accept individual complaints from teachers, non-teachers, administrators, or others concerning the operation of site-based management schools unless specifically requested to do so by the Collaborative Leadership Team at the project school.

6. Funds allocated to schools will specify fixed and discretionary costs. Funds designated as discretionary shall include but not be limited to expenditures for the following areas: substitutes for teachers, administrators, and nonteaching staff; instructional supplies; instructional equipment; replacement textbooks; supplementary textbooks; office supplies; office equipment; custodial supplies; meeting time; and possibly minor maintenance.

   The Site-Based Management Review Committee may recommend decentralization of additional components of the district's budget through the Superintendent, where appropriate, during subsequent fiscal years.

   Incentives for staff and students must be adopted as part of the overall budget. This incentive system must also detail consequences. One aspect of an incentive system could be the use of monies from one budget year to the next. Categorical funds from state or federal sources will be allocated to the project site based upon the funding sources' guidelines.

7. The review and refinement of the Toledo Public Schools' Course of Study and related textbook adoptions will be handled centrally. Project schools may select supplemental books and materials to enhance the instructional process. Upon request, a curriculum support team will provide each project site with testing and curricular information relevant to the site.

8. Staff at the schools selected for site-based management will remain at the school unless they choose to transfer. If problems with a staff member are identified by the Collaborative Leadership Team, the regular negotiated process will be utilized. When a vacancy occurs after the first year, the Personnel Office will send a list of administrator and teacher transfer applicants to the Collaborative Leadership Team. Selection will be made at the site. Non-teaching vacancies will be filled according to the AFSCME contract. When there are no transfers and new employees must be hired, the Personnel Office will conduct preemployment checks of potential employees. The Personnel Office will then forward the names of qualified new applicants to the site. Selection will be made at the site.

9. An evaluation component will be established for each project site. This component will involve both process and product evaluations. The process evaluation will review the effectiveness of such developmental and implementation activities as goal setting, educational design, community and staff involvement and budgeting. The focus will be on whether each school is following the processes as written and planned and is the timeline being followed. The product evaluation focuses on the results. It will review the extent to which each school is achieving its goal. Improvement of student achievement is important in product evaluation.

   Baseline data must be gathered immediately upon the identification of a school and the setting of goals and objectives. Student achievement can be gathered using both criterion-referenced and norm-referenced tests on a pre and post test basis. Also, data on student attendance, suspensions, student attitudes, parental attitudes and staff attitudes can be gathered. Some of this information is already available and other information can be obtained from surveys. Comparisons with comparable non-site-based managed schools will be made.

10. A parent component will be established at each project site.

11. Site-based managed schools may submit a plan for adjusting the school calendar and the school day. Such adjustments must stay within the state mandates, the school's budget, and address the transportation needs of individual students. The Review Committee must approve these adjustments and recommend changes through the Superintendent to the Board of Education.

12. Task forces will be established composed of teachers, non-teachers and administrators to assist project sites with technical/instructional services as requested by the Collaborative Leadership Teams or the Review Team.

13. A Site-Based Management Academy will be established to train future Collaborative Leadership Teams composed of teachers, non-teachers, and administrators in implementing site-based management programs.

14. Additional meeting time will be provided to the staff to help assure the success of the project site.

15. Site-based managed schools will adhere to the student discipline and attendance policies of the Toledo Public Schools. Where these policies are unclear, the Collaborative Leadership Team will make recommendations through the Superintendent to the Board of Education for possible implementation during the school year. Within existing policies, the Collaborative Leadership Team may establish fair and objective rules.

16. The extent and speed of growth toward site-based management depends on the success of these project schools to improve student achievement. Initially, the project schools should number up to five (5) elementary schools. These schools will be chosen after negotiations are concluded. The decision to add schools will be made in January of each succeeding year.

17. This agreement will terminate on June 1, 1995, unless the parties mutually agree to continue it.

18. It is understood and agreed that this agreement shall become effective upon ratification by all the parties hereto.

FOR THE BOARD:

Crystal Ellis — 2/13/92
Crystal Ellis — Date
Superintendent

Frank T. Pizza — 2-13-92
Frank T. Pizza — Date
Chief Negotiator

Gerald J. Biernacki — 2/13/92
Gerald J. Biernacki, Ed.D. — Date
Assistant Superintendent,
Curriculum and Administrative Personnel

Joe D. Coley — 2/13/92
Joe D. Coley, Ph.D. — Date
Manager, Business Affairs and
Financial Services

William Lehrer — 2-13-92
William Lehrer — Date
Assistant Superintendent,
School Management/Teacher Personnel

FOR THE UNIONS:

Dal Lawrence — 2-21-92
Dal Lawrence — Date
President, Toledo Federation
of Teachers

David E. McClellan — 2-13-92
David E. McClellan — Date
President, Toledo Association
of Administrative Personnel

George Tucker — 3/12/92
George Tucker — Date
Regional Director, American
Federation of State, County, and
Municipal Employees, Ohio Council 8

Bradley Aemisegger — 3/12/92
Bradley Aemisegger — Date
President, AFSCME Local 2853

Carol Faught — 3/12/92
Carol Faught — Date
President, AFSCME Local 2174

Stevenson Harris — 3/12/92
Stevenson Harris — Date
President, AFSCME Local 349

Paul Knopp — Date
President, AFSCME Local 272

Helen Nutter — 3/12/92
Helen Nutter — Date
President, AFSCME Local 840

Appendix D
Board of Education Resolution on Site-Based Decision-Making

TOLEDO CITY SCHOOLS
Toledo, Ohio

The Board of Education of the Toledo City School District, County of Lucas, Ohio, met in Regular Session at Seven o'clock p.m. on the 26th day of November, 1991, at the office of said Board of Education, Manhattan and Elm Streets, Toledo, Ohio, with the following members present:

Mrs. Brenda L. Facey
Miss Patricia A. Kennedy
Dr. Thomas R. Lopez
Mr. Kenneth J. Perry
Mrs. Wilma D. Brown

Dr. Lopez made a motion to approve the following Resolution:

RESOLUTION NO. 65-92

RESOLUTION TO EXPLORE SITE-BASED MANAGEMENT

WHEREAS, there appears to be considerable interest in some circles in "site-based management" as a model for school reorganization; and

WHEREAS, the Board of Education recognizes that the general concept may be useful in improving the delivery of services to the school children of this district; and

WHEREAS, attempts across the country thus far to implement various models have been problematic and controversial in some cases; and

WHEREAS, the Board of Education must be assured that the interests of the Toledo taxpayer and the children in the District are protected and well-served in any and all reform proposals; now, therefore

BE IT RESOLVED that the Superintendent of Schools is hereby directed to develop plans (goals, means, and calendar questions) in consultation with others to develop a site-based management program that will include the school system or a part of the school system within the following guidelines:

1. Planning is to include a range of practical alternatives submitted to the Board of Education with a recommendation by the Superintendent;

2. Projects, pilots, and all programs and proposals must contain "sunset" provisions;

3. Proposals and plans must be reviewed and must be approved officially by the Board prior to any implementation.

Miss Kennedy seconded the motion, and roll being called upon the question of adoption of the Resolution, the vote resulted as follows:

Mrs. Brenda L. Facey	Aye	
Miss Patricia A. Kennedy	Aye	
Dr. Thomas R. Lopez	Aye	
Mr. Kenneth J. Perry	Aye	
Mrs. Wilma D. Brown	Aye	Adopted.

TREASURER'S CERTIFICATION

I, David R. Nissen, Treasurer of the Board of Education of the City School District of the City of Toledo, Lucas County, Ohio, do hereby certify that the foregoing Resolution was made and adopted by the Board at its Regular Meeting held on November 26, 1991.

November 27, 1991

Treasurer of the Board

Appendix E
Request for Proposal
Procedure for Selection for Site-Based Management/
Shared Decision Making

REQUEST FOR PROPOSAL
PROCEDURE FOR SELECTION FOR
SITE-BASED MANAGEMENT/SHARED DECISION MAKING

Rationale:

There is a need to improve the academic achievement of students in Toledo schools as indicated by test scores of students on norm-referenced tests. There are indications in the literature and in discussions between educational professionals and the business community that decision-making at the school level may lead to improved academic achievement of students through empowerment of staff and parents at the local site.

In order to address and assess this stated need of improved student performance, the school district is requesting building proposals for site-based management.

Definition: Site-Based Management

Site-Based Management means that each school takes the responsibility for providing effective education for its students. The staff at each school creates a plan and uses the finances and other resources available to achieve that goal.

Procedures:

If your school is interested in Site-Based Management, please develop a plan and complete the application utilizing the Educational Trust Agreement provided to you. The plan should be developed with the input and support of the entire staff. The proposal should be signed by the principal, TFT building representative, and AFSCME representative.

This proposal is a preliminary document to be utilized for selecting schools. A more detailed plan will be developed and submitted by a Collaborative Leadership Team utilizing the resources of the staff and community after consultation with the Review Committee. This detailed plan shall be completed by May 1, 1993, and will be used for program implementation.

Timelines:

All applications must be submitted no later than March 1, 1993, to Dr. Gerald Biernacki, Assistant Superintendent, Room 105 of the administration building.

All applications submitted will be reviewed by the Review Committee and the schools selected for participation will be notified by March 19, 1993. Program planning can begin immediately with full implementation in September, 1993.

Application: (Copy attached)

All sections of the application must be completed and signed by the principal, TFT representative and AFSCME representative.

If you have any questions regarding this matter, please contact Dr. Biernacki at 729-8233.

rm
12/2/92

APPLICATION FOR SELECTION
FOR
SITE-BASED MANAGEMENT/SHARED DECISION MAKING

NAME OF SCHOOL_____

CURRENT STUDENT ENROLLMENT_____

TITLE OF PROPOSAL_____

_____

DATE SUBMITTED _____

STRATEGIES TO BE
UTILIZED TO IMPROVE
ACADEMIC ACHIEVEMENT_____

_____

_____

_____

SUBMITTED BY:

_____ _____
Signature - Building Principal Date

_____ _____
Signature - TFT Representative Date

_____ _____
Signature - AFSCME Representative Date

rm
12/2/92

1. STATEMENT OF STRENGTHS:

List the strengths of your school. (Prioritize numerically)

2. STATEMENT OF NEEDS:

List the most serious problems in your school. (Prioritize numerically)

3. STATEMENT OF OBJECTIVES:

Write objectives which focus on solving the problems cited in the Needs Section so that student academic achievement will increase.

4. PLAN OF ACTION:

Based on your responses to items 1, 2, and 3, how do you intend to improve student performance utilizing site-based management/decision making?

5. PARENT-BUSINESS-COMMUNITY:

Describe the provisions in your plan for involvement of local school parents and local school business individuals. Explain to what degree other local community individuals would be involved.

6. ADHERENCE TO EDUCATIONAL TRUST AGREEMENT:

If your plan differs in some way, explain how it varies from the Educational Trust Agreement.

7. **EVALUATION PLAN:**

In general terms, describe how the project objectives will be evaluated.

8. **INCENTIVES:**

Describe what you need that you don't have now for this project to be successful. Be specific.

rm
12/2/92